

Instructions Please Read

Dear Taxpayer:

Enclosed please find your **Clause 18-Financial Hardship** (due to age and infirmity) Application for Fiscal Year 2017. The filing deadline for Fiscal Year 2017 April 1, 2017.

You must complete the following sections of the application in order for our office to process your application.

- 1) Section A (Identification & Ownership as of July 1, 2016)
- 2) Section B (Exemption Status)
- 3) Section C (Employment Status)
- 4) Section D (Insurance Benefits)
- 5) Section E (Family Assistance)
- 6) Section F (Financial Statement, please be as detailed as possible)
- 7) Section G (Signature)

The following must be enclosed along with your application:

- ☐ **A physician's letter documenting your infirmity and employment status**
- ☐ **Copy of Birth Certificate**
- ☐ **COMPLETE 2015 Federal Income Tax Return ***
- ☐ **Documentation of Liabilities & Expenses, indicated in Section F**
- ☐ **Copies of all assets listed in Section F, indicating Value as of July 1, 2016**

- ❖ Checking Accounts
- ❖ Savings Accounts
- ❖ Certificates of Deposit
- ❖ IRA Account
- ❖ Stocks, Bonds, & Savings Bonds
- ❖ Real Estate-other than your primary residence

- ☐ **Trust Verification (if applicable)**

The applicant must be a Trustee of the Trust **AND** also be an Individual Beneficiary of the Trust.

For properties held in a Trust only-

Enclose the following (unless on file with the Assessor's Office):

- ☐ A copy of the entire Trust Document, including the Schedule of Beneficiaries.
- ☐ A copy of any amendments made to the trust and or Trustees since July 1, 2015.
- ☐ A copy of any amendments made to the Schedule of Beneficiaries.

Please note:

The Complete Trust, Amendments and Schedules "Must" be recorded at the Registry of Deeds.

Continued on reverse

*If you do not file a Federal Income Tax Return, please request a "FILE NO INCOME TAX RETURN" form.
Also in order to verify income, please enclose;

☐ State Income Tax Circuit Breaker (CB Form)

Or

☐ All 2015 1099 forms

☐ All 2015 W-2 forms

Your application cannot be processed unless it is completed and all required documents have been received.

If you have any further questions, please contact our office at (781) 316-3050.



Town of Arlington
Assessor's Office
(781) 316-3050